



# INTERNATIONAL EGG AND POULTRY REVIEW

ISSN 1522-5100



U. S. Department of Agriculture

Agricultural Marketing Service

Poultry Programs

Market News Branch

## FAO: World agriculture towards 2015/2030

Poultry meat's share in world meat production increased from 13 percent in the mid-1960's to 28 percent currently. Per capita consumption increased more than three fold over the same period.

Brazil and Thailand became significant exporters, while Mexico became a large importer together with the more traditional importers of the Near East region (Saudi Arabia, Kuwait and the United Arab Emirates) and Hong Kong.

### Net trade positions of major importers and exporters of poultry meat ('000 tons)

	1964/66	1974/76	1984/86	1997/99
<b>Importers</b>				
Japan	-9	-28	-130	-666
Former Soviet Union	-15	-61	-143	-956
Mexico	0	-1	-17	-297
Korea	0	0	0	-40
Saudi Arabia	-3	-47	-169	-292
<b>Exporters</b>				
United States	101	100	247	2,548
EU-15	-79	59	253	915
Brazil	0	7	266	621
Eastern Europe	59	169	287	38

Data include the meat equivalent of trade in live animals

### Poultry and Egg Production, past and projected, in million tons

	1967/69	1987/89	1997/99	2015	2030
<b>Poultry meat</b>					
World	12.9	37.2	62.8	100.6	143.3
excl. China	12.1	34.6	51.2	81.4	117.5
Developing Countries	3.3	13.2	31.3	59.1	93.5
excl. China	2.5	10.6	20.7	39.9	67.7
excl. China & Brazil	2.2	8.6	15.6	31.9	56.4
Sub-Saharan Africa	0.3	0.7	0.9	1.9	4.1
Latin America and the Caribbean	1.0	4.7	10.5	18.2	27.3
excl. Brazil	0.7	2.7	5.4	10.2	16.0
Near East/North Africa	0.4	2.1	3.2	7.1	11.6
Industrial Countries	8.1	18.8	27.7	37.5	44.1
Transitional Countries	1.5	5.2	2.9	4.1	5.7
<b>Eggs</b>					
World	18.7	35.6	51.7	70.4	89.9
Developing countries	4.9	16.2	33.7	50.7	69.0
excl. China	3.2	9.5	13.5	24.6	37.8
Sub-Saharan Africa	0.3	0.7	0.9	1.8	3.4
Latin America and the Caribbean	1.2	3.6	4.6	7.3	10.4
Near East/North Africa	0.4	1.5	2.2	3.6	5.3
Industrial countries	10.7	12.8	13.7	14.8	15.5
Transition countries	3.1	6.5	4.3	5.0	5.5

Source: [www.fao.org/docrep/005/y4252e/y4252e00.htm](http://www.fao.org/docrep/005/y4252e/y4252e00.htm)

## U. S. Poultry Outlook

Total exports fell from 5.56 billion pounds in 2001 to an estimated 4.87 billion pounds in 2002. Trade issues with Russia and disease outbreaks led to a wide range of bans on product from certain States. Broiler exports in 2003 are forecast to increase to 5.25 billion pounds, 8 percent above 2002 but below 2001's record 5.56 billion pounds.

Russia has recently indicated that it will place a quota on poultry imports starting around May 1st. Russia has also stated that before June 1, all plants that want to export to Russia should be reinspected and approved by Russian veterinarians. To date, only a small number of plants have passed the certification process and no new plant inspections are currently scheduled.

January 1, 2003, according to the NAFTA, quotas and tariffs on poultry products entering Mexico were phased out. However, the United States agreed to Mexico's introduction of a provisional safeguard under NAFTA that establishes a tariff rate quota and allows duty free imports of chicken legs quarters, thighs, and drumsticks up to 50,000 tons during the next 6 months. Additional imports of these products in this 6-month period will be subject to a 98.8 percent tariff, same as 2001.

Currently there are ongoing discussions with the Chinese government regarding changes in poultry labeling requirements. China insists on labels printed directly on shipping cartons and plastic inner liners and has placed a deadline of April 1, 2003 on this new requirement after which shipments without the correct labeling will be refused entry.

Turkey exports dropped sharply in 2002 due to disease outbreaks and trade disputes. Exports to Mexico fell 13 percent through November and exports to Russia were less than half last year's level. A doubling of exports to Hong Kong helped mitigate some of the decline. Total turkey exports in 2003 are forecast to rise 5-6 percent, and will be driven primarily by shipments to Mexico. Exports to Russia will likely be tempered by the policy change in the global poultry quota, due to be instituted in early May. If importers choose to focus on importing broiler legs, turkey exports to Russia may drop further.

Source: Agricultural Outlook Forum 2003, USDA

### U.S., Brazil facing similar trade challenges with Russia

Brazil is facing export trade challenges with Russia that are very similar to ones that the U.S. has been dealing with for several months. A Russian news report said recently that Russia was prepared to restrict meat imports from Brazil because of veterinary violations. Sergei Dankvert, deputy minister of agriculture, was quoted as saying in the report that the Brazilians violated Russia's veterinary requirements. "The dialogue between Brazil and our veterinary service is not effective," Dankvert said. "Furthermore, there is also a desire to hide cases of dangerous diseases of animals." Dankvert said that some Brazilian meat shipments arrived without veterinary certificates, as required, and that some export documents contained erroneous information. "The lack of respect for Russian laws may receive a tough response," Dankvert said.

Source: Watt PoultryUSA 3-10-03

**Inspected Egg Products-U.S. & Canada Export/Import Trade****U.S. Exports to Canada, in Pounds (000) (Preliminary)**

	Week Ending March 08, 2003		Year-To-Date	
	2003	2002/1	2003	2002
Liquid	103	459	1,773	3,258
Frozen	0	0	0	0
Dried	0	1	84	51
Total	103	460	1,857	3,309

**U.S. Imports From Canada, in Pounds (000) (Preliminary)**

	Week Ending March 08, 2003		Year-To-Date	
	2003	2002/1	2003	2002
Liquid	43	412	1,260	1,483
Frozen	193	181	725	738
Dried	7	46	47	572
Total	243	639	2,032	2,793

**Inspected Shell Eggs****U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**

	Week Ending March 08, 2003		Year-To-Date	
	2003	2002 /1	2003	2002
Jumbo	0	0	0	83
Extra Large	0	120	150	819
Large	480	300	5,203	14,048
Medium	1,590	2,510	5,764	10,726
Ungraded	0	0	1,470	0
Misc	720	300	732	5,524
Total	2,790	3,230	13,319	31,200

/1 Comparable Week, to-date figures may not total due to rounding.

Source: USDA/AMS Poultry Programs, Market News Branch in cooperation with Agriculture Canada, Poultry Development Division.

**LIVE POULTRY SLTRD UNDER INSPECTION** W/E 08-Mar-03

(PRELIMINARY)

**U.S. FOWL SLAUGHTERED DOMESTICALLY**

	LIGHT HENS	HEAVY HENS	TTL HENS
	THOUSANDS		
HEAD	1,465	1,255	2,720
LAST WEEK	1,686	1,296	2,982
SAME WEEK YR AGO	1,634	1,319	2,953
TO-DATE/2003	16,248	13,415	29,663
TO-DATE/2002	17,894	12,785	30,679

	LIGHT HENS	HEAVY HENS	TTL HENS
	THOUSANDS		
HEAD	221	0	221
LAST WEEK	347	0	347
SAME WEEK YR AGO	482	0	482
TO-DATE/2003	3,323	50	3,373
TO-DATE/2002	3,735	20	3,755

SOURCE: AGRICULTURE CANADA, PLTRY DEVELOPMENT DIV.

**TOTAL U.S. FOWL SLAUGHTERED IN THE U.S. AND CANADA**

	LIGHT HENS	HEAVY HENS	TTL HENS
HEAD	1,686	1,255	2,941
LAST WEEK	2,033	1,296	3,329
SAME WEEK YR AGO	2,116	1,319	3,435
TO-DATE/2003	19,571	13,465	33,036
TO-DATE/2002	21,629	12,805	34,434

SOURCE: USDA/AMS PLTRY PROGRAMS, MRKT NEWS BR.

**CENTRAL REGION MECHANICALLY SEPARATED CHICKEN**

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

14-MAR-2003				
CHICKEN				
	PRICES		VOLUME	
	(Cents per Pound)			

FAT	FROZEN	FRESH	TOTAL	EXPORT
CONTENT				
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

**CHICKEN, WITH SKIN ADDED**

	PRICES		VOLUME	
	(Cents per Pound)			

FAT	FROZEN	FRESH	TOTAL	EXPORT
CONTENT				
15% OR LESS				
RANGE	14.50-15.00	12.00-16.00	206,000	40,000
WTD AVERAGE	14.83	13.36		
15-20%				
RANGE	15.00	11.00-19.00	1,398,000	400,000
WTD AVERAGE	15.00	14.30		

20% OR MORE  
RANGE - - - -  
WTD AVERAGE  
\* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

**EASTERN REGION MECHANICALLY SEPARATED CHICKEN**

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

14-MAR-2003				
CHICKEN				
	PRICES		VOLUME	
	(Cents per Pound)			

FAT	FROZEN	FRESH	TOTAL	EXPORT
CONTENT				
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

**CHICKEN, WITH SKIN ADDED**

	PRICES		VOLUME	
	(Cents per Pound)			

FAT	FROZEN	FRESH	TOTAL	EXPORT
CONTENT				
15% OR LESS				
RANGE	15.00-17.00	15.20-16.00	994,400	736,000
WTD AVERAGE	16.00	15.49		
15-20%				
RANGE	13.60	10.50-15.00	1,286,400	-
WTD AVERAGE	13.60	12.22		

20% OR MORE  
RANGE - - - -  
WTD AVERAGE  
\* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

**NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 14 MARCH 2003.**

The trade sentiment on fresh tom breast meat and fresh destrapped tenderloins was steady to instances firm with trading noted at higher price levels on part loads. Demand slow to moderate. The fresh wing meat undertone was fully steady to firm with light trading noted at 60 cents shipping point, frozen fully steady. Demand was active on fresh for limited availability, frozen light to fair. The undertone on scapula was steady to fully steady and at least steady on frozen destrapped tenderloins. Demand was fair on scapula, light on frozen tom breast meat and destrapped tenderloins. Trading light on all items. Fresh scapula traded at 63-64 cents delivered domestic and hen drums at 16 cents delivered export.

**FRIDAY, MARCH 14, 2003****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	21.50-23.00		22.20	344	22.12	916
WINGS FULL-CUT - TOMS	15.00-16.00		15.50	208	15.13	416
WINGS, V-TYPE, TOM	24.00		24.00	208	24.00	208
TAILS		F	19.00	80		
MECHANICALLY SEPARATED 2/		W	19.17	48	19.38	128
THIGH MEAT - FROZEN	52.00		52.00	80	48.90	316

**THURSDAY, MARCH 13, 2003****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	21.00-22.00		21.43	184
WINGS FULL-CUT - TOMS	14.50-15.00		14.75	208
WINGS, V-TYPE, TOM				
TAILS		F	19.00	80
MECHANICALLY SEPARATED 2/		W	19.17	48
THIGH MEAT - FROZEN		W	47.41	196

**WEDNESDAY, MARCH 12, 2003****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	23.00		23.00	148
WINGS FULL-CUT - TOMS		F	14.32	248
WINGS, V-TYPE, TOM				
TAILS		F	19.00	80
MECHANICALLY SEPARATED 2/	19.00-20.00		19.17	48
THIGH MEAT - FROZEN	47.00-49.00		47.41	196

**TUESDAY, MARCH 11, 2003****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	22.00		22.00	240
WINGS FULL-CUT - TOMS		F	14.32	248
WINGS, V-TYPE, TOM		T	25.00	104
TAILS		F	19.00	80
MECHANICALLY SEPARATED 2/	20.00		20.00	40
THIGH MEAT - FROZEN	50.00		50.00	40

**MONDAY, MARCH 10, 2003****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		F	21.48	384
WINGS FULL-CUT - TOMS		F	14.32	248
WINGS, V-TYPE, TOM		T	25.00	104
TAILS		F	19.00	80
MECHANICALLY SEPARATED 2/	19.00		19.00	40
THIGH MEAT - FROZEN		F	49.04	932

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.

210 WALNUT STREET, ROOM 951, DES MOINES, IOWA, 50309 515/284-4471 FAX 515/284-4468

Visit us on the World Wide Web at <http://www.ams.usda.gov/marketnews.htm>